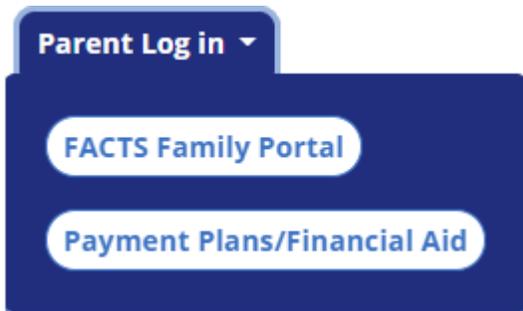

Setting up a Payment Plan from Family Portal

For schools using Premiere Integration, Customers and Authorized Parties ready to set up a payment plan will start from their Family Portal. This article gives some basic steps, though there may be variances based on school configuration.

Log into Family Portal

Customers or Authorized Parties start by logging into the Family Portal by navigating to www.factsmgt.com and clicking FACTS Family Portal under the **Parent Log in** menu. Even though the user wants to view Payment Plans, they must click FACTS Family Portal to log in.



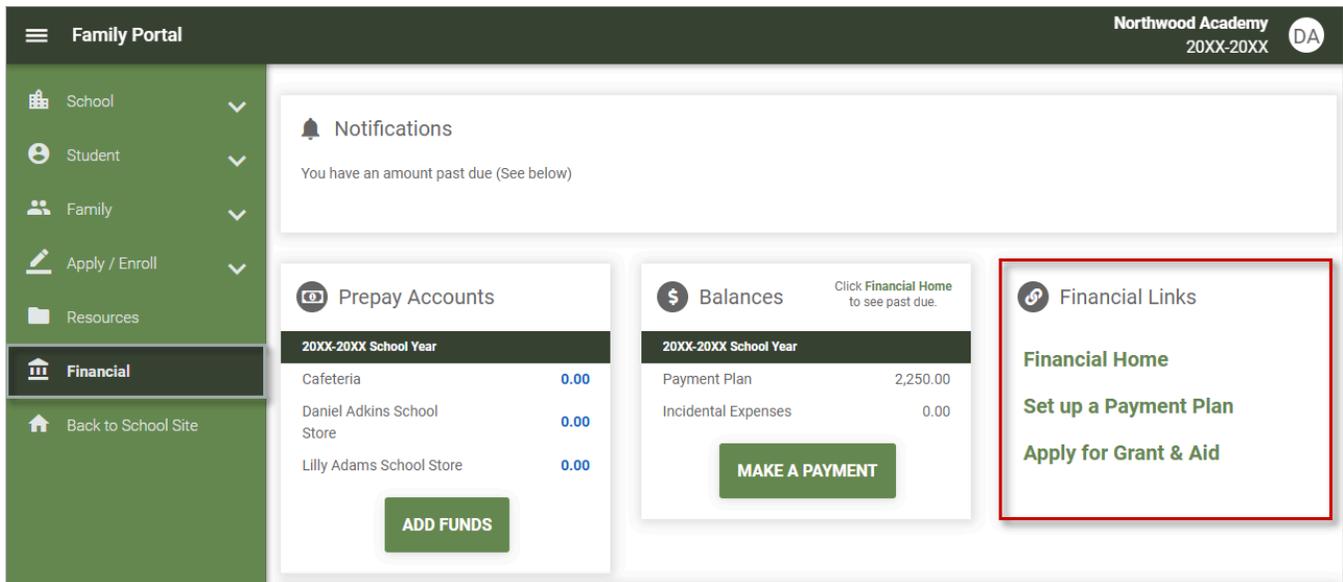
Set up a Payment Plan link

- Click **Financial** on the left side menu.
- Click **Set up a Payment Plan** in the Financial Links.



Tip

If the Set up a Payment Plan link is not showing for your families, check that your school configuration has this feature turned on. For more information, see [Manage Family Portal Configuration Options](#).



Payment Plan setup steps

The person who sets up the payment plan will be the [Plan Owner](#) regardless of whether they are listed as the Customer or an Authorized Party in the Financial Management system.

1. **Plan Options:** Select a payment plan and click Next.
 - Note plan dates, plan special messaging, and information about possible fees.
2. **Payment Details:** Enter your financial account information.
 - The person setting up the payment plan must be a signer on any financial account entered.
3. **Payment Schedule:** Select your payment date and review your schedule.
4. **Review and Authorize:** You can select the links to the right to go back and edit the entries. Check the box to agree to the Terms and Conditions and click Authorize.
5. **Thank You:** Print or Email your confirmation page. It includes your agreement number which can be used to reference your tuition payment plan with your school and FACTS.

A confirmation notice is sent to the customer and/or authorized party with the payment plan details when the agreement is finalized. Payment plan balances can be seen in the **Financial** section of the Family Portal and the user can click **Financial Home** to view more detail.